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ABSTRACT

This package is the third of twelve in the Skills for Adult Guidance Educators (SAGE) system, which provides instruction in a set of necessary competencies specifically designed for adult education counselors, teachers, and paraprofessionals. The materials provide a process for developing and implementing counseling and guidance programs unique to different target populations, program settings, and local conditions. Contents include four modules which pertain to two role statements. The role statements describe the trainee objectives to demonstrate (1) ability to counsel with client regarding retirement plans (2 modules) and (2) ability to counsel with client regarding leisure time and avocational activities (2 modules). Each module contains some or all of the following information: topic, learning objective, rationale, preassessment, learning activities, postassessment, and appended materials (supplemental activities, tape transcripts, and articles). (YLB)

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SKILLS FOR ADULT GUIDANCE EDUCATORS.

Package 3

Retirement and Leisure Counseling

Developed by

the

ADULT EDUCATION PROGRAM

of the

Northwest Regional Educational Laboratory
710 S. W. Second Avenue
Portland, Oregon 97204

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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Introduction

The modules in this package discuss various aspects of retirement and leisure counseling skills. The modules range from knowledge of theories of retirement counseling to investigating leisure and recreational activities available in a local community. The trainee should be able to complete these modules with a minimum of supervisory assistance.

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Role Statement 6.0

Demonstrate ability to counsel with client regarding retirement plans

MODULE 6.1

TOPIC

Secure knowledge of theories of aging.

LEARNING OBJECTIVE

The trainee will have a knowledge of distinguishing characteristics among modern theories of aging.

RATIONALE

A teacher/counselor needs a theoretical base to better understand his own involvement in the aging process. An understanding of one's own frame of reference is more important than following an accepted theory. Understanding one's own frame of reference is made easier by being able to compare and contrast it with established, tested theories.

PREASSESSMENT

Respond with eighty percent accuracy to the following. In the blank before each statement, place the letter(s) for the aging theory which is most nearly represented by the statement.

D = Disengegement	DV = Developmental
A = Activity	C = Continuity
C C = Crisis	SM = Subculture-Minority

_____ 1. Aging is a mutual withdrawal, by the individual and society, resulting in decreased interaction between the aging person and others in the social system.

_____ 2. Optimum aging pattern is to resist loss of social roles by maintaning as many middle-age activities as possible.

_____ 3. Optimum aging pattern is to react against the negative self-conception characteristic of aging, and view the problems of aging in a group context through group identification.

_____ 4. The older person who feels good about himself/herself will usually be the person who has reached a new balance characterized by less psychological distress, altered types of relationships, and decreased social interaction.

_____ 5. Optimum aging pattern is to resist loss of social roles by finding substitutes for those activities forcefully given up.

_____ 6. Optimum aging pattern is the anticipation of social difficulty for and with the aging by providing the aging participant with a social role within the system which he can maintain.

_____ 7. Aging is a process that is inherently selective in which movement is, in general, from versatility to efficiency. Encountered in succession are choice points at which decisions determining the ensuing aging process are made.

_____ 8. Man responds to an age-ordered sequence of social duties which are required of a person as he moves through the life span.

_____ 9. Relocation changes spatial boundaries and organization of activities; since the aging seem to be spatially bounded, maintenance requires adaptability, substitution, addition or integration ingenuity.

_____ 10. The occurrence of embarrassment from the stigma of identity breakdown incapacitates all performers for the continued (and possibly future) performances of their roles by disrupting identity and destroying the assumptions the performers have made about each other—assumptions upon which they operate socially.

_____ 11. The extent of participation in an aging subculture varies with the type of community, the characteristics of the elderly involved, and the conditions under which they form or participate in the subculture.

_____ 12. The maintenance of contact with the social environment is the condition of maintaining a sense of life satisfaction.

_____ 13. Although individuals differ, the expectation of death is universal, and loss of ability is probable; therefore, the reductions in interaction and the loss of central roles result in a shift in the quality of relational rewards and a shift from vertical to horizontal solidarities.

_____ 14. The time span is continous except for the inevitable changes in biology and health; older people are the same as middle-aged people.

_____ 15. Successive stages are regarded as occuring in either a limited or extensive wordly framework; the concern here is with structure and function as worldly events.

_____ 16. In anticipation of a loss of occupational identity and a functional role, it is encouraged that time be spent in leisure activities which hold meaning and can be developed into a social identity.

_____ 17. The time it takes to be socialized into an age-graded sub-culture and out of it, and the limited period for which it is expected to be followed by individuals, prevents the subculture from being highly elaborate or including most of its followers completely.

_____ 18. The society and the individual prepare in advance for the ultimate withdrawal by incurable, incapacitating disease, and death by an inevitable, gradual, and mutually satisfying process.

_____ 19. Since role losses are inevitable as one ages, the distinctive behavioral norms and shared expectations that are affecting more and more people who are sharing a common fate, has led to the emergence of an aged role, and the development of normative descriptions.

_____ 20. The aging need to adopt new social roles or expand old social roles as they progress into retirement to replace those lost by the transition from work to non-work.

LEARNING ACTIVITIES

Learning Activity One

Read as many of the following as are available:

1. Cumming, E. and W. Henry. Growing Old: The Process of Disengagement. New York: Basic Books, Inc., 1961.

2. Fruekel-Brunswick, Else. Adjustments and Reorientation in the Course of the Life Span. In B. L. Neugarten (editor) Middle-Age and Aging. Chicago: The University of Chicago Press, 1968.

3. Cumming, E. "New Thoughts on the Theory of Disengagement." In R. Kastenbaum (ed.) New Thoughts on Old Age. New York: Springer Publishing Company, 1964.

4. Kastenbaum, R. "Engrossment and Perspective in Later Life: A Developmental-Field Approach." In R. Kastenbaum (ed.), Contributions to the Psychobiology of Aging. New York: Springer Publishing Co., 1965.

5. Maddox, G. L. "Persistence of Life Style Among the Elderly: A Longitudinal Study of Patterns of Social Activity in Relation to Life Satisfaction." In B. L. Neugarten (ed.) Middle-Age and Aging. Chicago: The University of Chicago Press, 1968.

6. Havighurst, R. J. "Successful Aging." In R. H. Williams, C. Tibbits, and W. Donahue (eds.), Processes of Aging Volume I. New York: Atherton Press, 1963.

7. Atchley, R. C. "Retirement and Leisure Participation: Continuity or Crisis?" Gerontologist. 11(1), I, 1971.

8. Rose, A. M. "Group Consciousness Among the Aging." In A. M. Rose and W. A. Peterson (eds.), Older People and Their Social World. Philadelphia: F. A. Davis Co., 1965.

9. Anderson, N. N. "The Significance of Age Categories for Older Persons." Gerontologist. 7(3), 1967.

Learning Activity Two

Discuss readings and/or theories with the director of the local Senior Citizen's Center.

Learning Activity Three

Discuss with at least three senior citizens (at least one female and one male) (age 65+) how they feel about retirement (disengagement, in one sense). Specifically discuss what needs are not being met.

OPTIONAL LEARNING ACTIVITIES

Optional Learning Activity One

Visit a Senior Citizen's Center and discuss with at least three senior citizens (at least one female and one male), their reasons for attendance at the center. Discuss with them also any life roles they have lost or gained since retirement.

Optional Learning Activity Two

Visit a nursing home for the aged and discuss with at least three residents (at least one female and one male), their extent of social involvement. Try to ascertain the degree of their disengagement, activities and/or continuity of life roles.

Optional Learning Activity Three

Discuss with at least three middle-age (45-55) people (at least one female and one male) their projected life roles after retirement. Pay particular attention to roles gained and roles lost.

If necessary, plan additional optional learning activities with supervisor.

POSTASSESSMENT

Complete the Preassessment with ninety percent accuracy. Critique an interview with a senior citizen (Learning Activity Three) with the supervisor. Specifically focus on his/her compliance with each of the six theories of aging.

MODULE 6.2

TOPIC

Investigate referral sources for senior citizens.

LEARNING OBJECTIVE

The trainee will be able to list at least ten community resources, two specifically related to each of the following five areas: (a) income and finances, (b) leisure and activities, (c) mental and physical health, (d) living accommodations, and (e) legal affairs. The trainee will also be able to list at least two services provided by each of the aforementioned community resources.

RATIONALE

Adult Basic Education students who are retired or approaching retirement are often confronted with personal crises. The transition from a structured, economically productive role, to an unstructured, economically non-productive role can be a traumatic adjustment. Crises can be brought about by lower income, boredom, decreased physical health, uncertainty as to legal affairs. A student with any, all, or a combination of these issues might well suffer scholastically or in terms of personal growth.

When one is very uncertain of what the future holds, and in his place in that future, real problems of anxiety and withdrawal can limit and handicap that person's growth. The ABE teacher and/or counselor must be aware of agencies and/or individuals in the community which can give appropriate assistance as needed.

If, for instance, a student is really anxious about boredom upon entering retirement, knowing resources which can help him use and fill his leisure time could be of immeasurable support and comfort.

PREASSESSMENT

List without error at least two community resources specifically related to each of the following: (a) income and finances, (b) leisure and activities, (c) mental and physical health, (d) living accommodations, and (e) legal affiars, for a total of ten resources. For each community resource, list without error at least two services, for a total of twenty services.

LEARNING ACTIVITIES

The following learning activities are grouped according to the same areas, (a) through (e), as in the preassessment. Plan and carry out as many of the following learning activities as necessary for competence in all five areas of postassessment.

Learning Activity One

(1) Discuss Social Security application procedures, benefits, and provisions with a Social Security representative.

(2) Visit a local Employment Division Office and discuss employment opportunities for the elderly. Specifically, can 65+ aged people be employed? If so, where? Are there any anti-discrimination rules for 65+ people?

(3) Visit local Welfare Office and investigate Food Stamp acquisition. Specifically discuss Food Stamp application and eligibility requirements.

Learning Activity Two

(1) Visit a Senior Citizen's Center and discuss with the director the Center's activities and leisure offerings.

(2) Visit and discuss with local Parks and Recreation Department their offerings for senior citizens.

Learning Activity Three

(1) Contact local Mental Health Clinic and discuss counseling services for senior citizens with the director.

(2) Discuss with a staff physician the geriatric services provided by the local hospital.

Learning Activity Four

(1) Visit a Federal Low Cost Housing facility and discuss eligibility and entrance requirements.

(2) Discuss with a state tax representative the eligibility requirements and application procedures for tax relief for senior citizens.

Learning Activity Five

(1) Discuss with a lawyer Will preparation and estate planning.

(2) Discuss with a Social Security representative Medicare, Medicaid, and insurance benefits for senior citizens.

OPTIONAL LEARNING ACTIVITIES

Optional Learning Activity One

Talk with the president of the local Senior Citizen's group about the quality and breadth of services available for senior citizens.

Optional Learning Activity Two

Investigate state and federal programs which offer services for senior citizens.

POSTASSESSMENT

List without error at least two community resources specifically related to each of the following: (a) income and finances, (b) leisure and activities, (c) mental and physical health, (d) living accommodations, and (e) legal affairs. For each community resource, list without error at least two services.

Role Statement 7.0

Demonstrate ability to counsel with client regarding leisure time and avocational activities

MODULE 7.1

TOPIC

Explore concepts of work, leisure, and recreation.

LEARNING OBJECTIVE

The trainee will be able to define work, leisure, and recreation in writing and to support each definition with at least one "expert" source.

RATIONALE

It is necessary to be able to define work, leisure, and recreation to be able to assist others in their understanding of these concepts. The emphases today of the relative importance of each of these concepts is necessarily shifting toward a new balance; this shift needs to be understood to help others recognize the shift and its significance.

The Adult Basic Education Counselor needs to be able to differentiate work, leisure, and recreational dimensions in order to better help students become more fully functional in relation to these dimensions.

PREASSESSMENT

Define in writing the concepts of work, leisure, and recreation and support each with at least one "expert" source. Judgment of adequacy will be made by at least one professional recreator and/or physical education instructor or recreational therapist and the supervisor.

LEARNING ACTIVITIES

Learning Activity One

Suggested reading:

1. de Grazia, S. Of Time, Work and Leisure. Garden City, New York: Doubleday and Company, Inc., 1964.

2. Dahl, Gordon J. "Time, Work, and Leisure Today." The Christian Century. February, 1971.

3. Kreps, Juanita. "Lifetime Allocation of Work and Leisure." Washington, D. C., Government Printing Office, 1968.

4. Lee, Robert. Religion and Leisure in America. New York, Abingdon Press, 1964.

5. Roberts, Kenneth. Leisure. London, Longman Press, 1970.

6. Touraine, Alan. "Leisure Activities, Social Participation and Cultural Innovation." From The Post Industrial Society. New York, Random House, 1971.

Learning Activity Two

Visit a local school's Health and Physical Education Department and discuss how leisure and recreational roles are being incorporated into the total life role concept.

Learning Activity Three

Visit a nursing home and compare work and leisure dimensions with at least two staff members and at least three residents. Specifically, look at the similarities and differences.

Learning Activity Four

Compare your concepts of work, leisure, and recreation with at least two people ten years your senior and with at least two people ten years younger than you.

Learning Activity Five

Discuss with a counselor (elementary, post secondary) Career Education in your state. Specifically look at how leisure and/or recreational education fits into the career model in your state.

Learning Activity Six

Investigate D.C.E. (Division of Continuing Education) offerings in your community. Separate courses offered into three categories: work, leisure, and recreation. Discuss with a community college, college or high school counselor any additional course offerings he/she sees as needed to offer total life role involvement.

POSTASSESSMENT

Complete Preassessment. Define work, leisure, and recreation and support each with at least one "expert" source. Judgment of adequacy will be made by at least one professional recreator and/or physical education instructor or recreational therapist and the supervisor.

MODULE 7.2

TOPIC

Investigate leisure and recreational activities.

LEARNING OBJECTIVE

The trainee will be able to list at least ten leisure and/or recreational activities. List two from each of the following five areas: (1) physical activity interests, (2) communicative interests, (3) informative interests, (4) creative and aesthetic interests, and (5) social interests.

RATIONALE

A teacher/counselor must possess a knowledge of leisure and recreational dimensions to help students become more fully functional in relation to leisure and recreational pursuits. Joseph Lee (in Nash,* p. 256) stated: ". . . play to the child is growth—the gaining of life; to the adult it is recreation—the renewal of life." This module specifically deals with activities for senior citizens.

PREASSESSMENT

Without error, list at least ten leisure and/or recreational activities, specifically two from each of the following five areas: (1) physical activity interests, (2) communicative interests, (3) informative interests, (4) creative and aesthetic interests, and (5) social interests.

LEARNING ACTIVITIES

Learning Activity One

Investigate leisure and/or recreational programs in your community sponsored by churches. Specifically, check into how many of the above-mentioned five areas are offered.

Learning Activity Two

If local community has a Fine Arts Society, investigate the extensiveness of their offerings.

*Nash, Jay B. Philosophy of Recreation and Leisure. William C. Brown Co., Publishers, 1960.

Learning Activity Three

Investigate local Parks and Recreation Department offerings. Specifically check into how many of the above-mentioned five areas, programs and/or activities are offered.

Learning Activity Four

Investigate local YMCA-YWCA for leisure and/or recreational offerings. Again, specifically look at the breadth of programs and/or activities as outlined in the above-mentioned five areas.

Learning Activity Five

Investigate leisure and/or recreational offerings at the local community college(s) and D.C.E. (Division of Continuing Education).

Learning Activity Six

Investigate Extension Service leisure and/or recreation offerings in your community relative to the five areas mentioned above.

Learning Activity Seven

Investigate local Senior Center for leisure and/or recreational offerings. Specifically look at the five areas mentioned above. Is the center covering all five areas?

POSTASSESSMENT

Complete the preassessment without error.